Managing your Sheets with the Sheet Set Manager – An Advanced Guide

Sam Lucido
CAD Services Manager and Senior Civil Designer
Haley & Aldrich, Inc.

CADproTips.com
@CADprotips
About the speaker

Sam Lucido

- I am a CAD Services Manager and Senior Civil Designer with Haley & Aldrich, Inc.
- AutoCAD since early 1990s
- Civil 3D and Map 3D since 2007
- Technical Writer for AUGIWorld
- Autodesk Certified professional and Expert Elite Member
- Owner of CADproTips.com
- If I can teach you one thing and make you think then I have done my job
Your First line of defense – your lab assistants

**Rick Ellis**  
President of CADapult Software Solutions, Inc.,  
Rick provides training and consulting services to clients around the country, helping them get the most out of their design software investment. Rick specializes in AutoCAD® Civil 3D®, AutoCAD® Map 3D, Autodesk® InfraWorks™, AutoCAD® Raster Design, and AutoCAD®. He is a member of the Autodesk Developer Network, and author of several critically acclaimed books on AutoCAD Civil 3D, AutoCAD Map 3D and AutoCAD; including the Practical Guide series.

**Tracy Chadwick**  
Coordinator and instructor for the Computer Drafting Technology program at Hutchinson Community College (HCC) in Hutchinson, Kansas. He is responsible for teaching a wide range of courses, including those on engineering graphics, AutoCAD software, Inventor software, and Revit Architecture software. Prior to his role in the Associate Degree program, Chadwick served as the manager and instructor of HCC’s Autodesk Authorized Training Center from 2001.

**Scott Wilcox**  
Senior CAD Designer  
Morrison Hershfield in Edmonton, Alberta, Canada.  
Scott has more than 25 years experience using AutoCAD, and has been using Civil 3D for 12 years. A former AutoCAD instructor, Scott currently serves on the Board of Directors and is Vice President at Autodesk User Group International AUGI.
Summary

• In this class, you will be able to take your existing company title blocks and create a template to use on all projects, increasing your productivity and efficiency on all current and future design projects.

• **Most importantly**, you’ll be able to **bring back value** to your employer and the **knowledge to help you excel** within your field.
Download the Handout
Key Learning Objectives

• Learn how to create a Sheet Set Template (.dst) file to be used as your Company Standard.

• Learn how to create a Standard title block linked to your sheet set template populating common project data.

• Learn how to create call out labels, views, and a sheet list table for your project.

• Learn how to create a page setup override to publish the entire drawing package to a PDF, DWF, or Plotter output.
Load the Profile
Exercise 1

Exercise 1: Starting your New Sheet Set

1. Start AutoCAD and Create a new Sheet Set using the SSM palette (Ctrl+4).
2. Select and Example Sheet Set.

3. Select Civil Imperial Sheet Set for this example. You can select any of these options this will give us subsets and properties from the Civil example.
Exercise 2

Exercise 2: Preparing your Drawing Title block

1. Start AutoCAD and open the Sheet Set in the Exercise 2 folder.
2. Notice the subsets have already been renamed to what is shown.

3. Open drawing ANSID_DWG-Template.dwg located in the start folder as shown.
Exercise 3: Adding Sheet Custom Properties

1. Start AutoCAD and open the Sheet Set in the Exercise 3 folder.
2. Right click on the Header and choose Properties as shown.
3. Select Edit Custom Properties on the lower left of the dialog box.
Exercise 4: Adding Sheet Set Custom Properties

1. Start AutoCAD and open the Sheet Set in the Exercise 4 folder as shown.

2. Right click on the Header and choose Properties as shown.
Exercise 5: Connecting the SSM template to the Drawing Template

1. Start AutoCAD and open the Sheet Set in the Exercise 5 folder.
2. Make sure that the correct SSM is open along with the C-100 sheet. Double click the C-100 tab in the SSM to open if it is not open.

3. We are now going to access the attribute data within our title block.
4. We already have an existing block therefore we are going to use ATTEDIT, BATTMAN, REFEDIT, or BEDIT to access the definitions which will make sure we are in the Edit Attribute Definition dialog box and not the enhanced attribute editor.
Exercise 6: Saving your Templates

1. Start AutoCAD and open the Sheet Set in the Exercise 6 folder.
2. Make sure that the correct SSM is open along with the C-100 sheet. Double click the C-100 tab in the SSM to open if it is not open.
Exercise 7: Testing the Templates

1. Start AutoCAD and Create a New Sheet Set. We are going to go through the wizard using the templates we have already setup.
Exercise 8: Creating your project Specific Template with Page Setups.

Every CAD project is different. Each project contains a special set of information that pertains only to that project and not to a global template. We have configured the templates to work with our title block now we must setup a project and make those settings take affect for our current workflow.

1. Start AutoCAD and open the Sheet Set in Exercise 8 folder.
Exercise 9: Creating New Sheets and Publishing your drawings.

Every CAD project is different. Each project contains a special set of information that pertains only to that project and not to a global template. We have configured the templates to work with our title block now we must setup a project and make those settings take affect for our current workflow.

1. Start AutoCAD and open the Sheet Set in Exercise 9 folder.
Exercise 10: Creating a Sheet Index Table

All design projects have a Sheet Index Table. We are now going to create a table style for our project then use that style to automate our sheets.

1. Start AutoCAD and open the Sheet Set in Exercise 10 folder.
2. Notice there are more sheets than before. The sheet set has been populated with data.
3. Double click or open drawing 20181115_G-100.
4. Type Table at the command prompt to bring up the table dialog box.
5. We have two types of Sheet Index Tables created for our project (one with headers and one without).
Exercise 11

Exercise 11: Creating Model Space Sheet Views

1. Under the start pane select Exercise 11 and open up X-Basemap located in the xrefs folder.

2. Notice in Model Space you have 3 named areas with markers.

3. Before making our views, check the Model space annotation scale since that is what the view will be inserted into the new drawing at.

4. Make sure the current scale is set to 1=100.
Exercise 12: Creating Views and adding callout labels

1. Open the Sheet Set located in the Exercise 12 folder.
2. Move to the Model View Tab and select add a location.
Exercise 13: Adding additional View Label Blocks

1. Open the Sheet Set located in the Exercise 13 folder.
2. Navigate through the sheet set and notice that all the fields and data are populated.
3. Right click your project and select properties.
4. Select the window on the right.
Exercise 14: Archiving and Etransmitting your Sheet Set

Archiving drawing sets during a design project becomes a necessary task, especially when we have those unexpected changes and “lock ups” where we need to go back a version just to see what was completed. Create a folder named archive in your project folder.

1. Right click on your sheet set. Access the Archive command by right clicking your project and selecting archive as shown below.
Exercise 15: Publishing your Sheet Set

The final piece of any project is the production. Remember when we setup the page setup overrides earlier in this session. We will now revisit those setting to publish our drawing set.
How did I do?

Class Survey:
Be sure to fill out the class survey located on the app.

Instructions:
Open the app
Click on the classes tap
Select the class
Click the “Take Survey” button at the bottom
Thank you!

My name is Sam Lucido and I am CADproTips